



# Understanding the Case Patient Portal

The new case patient portal will allow cases to enter contacts on their phone or computer directly from the digital notification they receive. Read on to understand how this may impact your work.

## WHAT CASE PATIENTS SEE: Case Notification and Portal

All cases who test positive for COVID-19 and flow into CCTO from NC COVID will be sent an automatic text and/or email notification attempting to inform them of their positive result via a link to a landing page. **This link is unique to the case patient and allows them to provide a symptom onset date, to calculate personal isolation dates, and to enter contacts. See below for the case patient's perspective.**

1. Case patient receives a text or email directing them to click a link with information about their COVID-19 test result. This link is now unique to this case.
2. Case patient clicks the link and arrives at a unique landing page that lists the date of their positive test and requires them to **enter their symptom onset date** or to select that they have not had any symptoms. **The page automatically uses this information to generate a unique isolation end date for 10 days after the symptom onset date (or 10 days after the test date if no symptoms).**
3. Case patients who click "Next" will be given next steps - to isolate from others, to notify their close contacts, to consider treatment, and to get the COVID-19 vaccine.
4. Case patients who click "Next" will be asked to confirm their identity by entering their date of birth, which was collected at the time of their test. *If the case enters a DOB that does not match the one in the system, they will receive an error message at the top of the page and will not be permitted to proceed.*

**1** Public Health Notification Inbox x

**Email and Text**

This is the NC COVID Community Team with an important message about your COVID-19 test results. For more information and support visit <https://dhhs-covid19-ccto-uat-po.powerappsportals.us/en-US/case/?id=76cf7d39-0910-ec11-b6e6-001dd8309357> or call 844-628-7223. The NC COVID Community Team may call from this number. Please answer the call!

**2** NCDHHS

**Landing Page**

Help slow the spread of COVID-19!

You have received a message from the NC COVID Community Team because you recently tested positive for COVID-19. The NC COVID Community Team is here to help you get the resources, information, and support you need to protect yourself and your family. You may also receive a phone call from the NC COVID Community Team at 844-628-7223. If you see us calling please answer the call!

Our records show you tested positive for COVID-19 on:

10/4/2021

Since you tested positive, you should isolate yourself from others to protect yourself and your loved ones. Isolation means that you should stay home and avoid sharing a bedroom, bathroom, or common spaces with anyone else in your household. You should isolate until the date provided to you below has passed AND 24 hours have passed since you have had a fever AND your symptoms have improved. For more information on how to properly isolate, please refer to [this CDC webpage](#).

Please enter the date your COVID-19 symptoms started to calculate your isolation end date:

My COVID-19 symptoms began on (MM/DD/YYYY): \*

6/10/1997

☐ I have not had any COVID-19 symptoms.

**3** NCDHHS

**Next Steps**

- **Isolate from Others:** Protect your friends and loved ones. For more information about safely isolating, please refer to the previous page by clicking the "Previous" button.
- **Notify your Close Contacts:** Your close contacts are people who you were within 6 feet of for more than 15 minutes within a 24 hour period while you were contagious. Click "Next" to help protect your close contacts and stop the spread of COVID-19.
- **Get your Vaccine:** COVID-19 vaccines are helping us safely get back to the people and places we love. Once you have recovered from COVID-19 and can no longer spread the virus, find your spot and get your shot. For more information about getting your vaccine, visit [YourSpotYourShot.nc.gov](#).
- **Consider Treatment with Monoclonal Antibodies:** If taken early, monoclonal antibodies may help you feel better faster and prevent the need for hospitalization from COVID-19. Learn more and find out whether you are eligible for this treatment at [covid19.ncdhhs.gov/treatment](#)
- **Answer the Call:** You may receive a phone call from the NC COVID Community Team to gather additional information and ensure you have the resources you need to quarantine. The call may come from 1-844-628-7223 or from your local health department phone number. Please answer the call!

**4** NCDHHS

**Confirm Identity**

Please Enter Your Date of Birth

Thank you for helping us confidentially notify your close contacts. This is an important step in stopping the spread of COVID-19. Before you share your contacts, we want to reconfirm that it's you! Please enter your date of birth, which you provided when you were tested.

Confirm DOB - MM/DD/YYYY

6/10/1997

**Error message when an incorrect DOB is entered.**

Incorrect Date of Birth - The date of birth that you have provided does not match the date of birth we have on record for your COVID-19 test. This may mean that you have received this message in error or that the date of birth we have on file is incorrect. Please call the NC COVID Community Team at 844-628-7223 from 7am to 7pm to speak to someone about getting this error corrected. Fecha de nacimiento incorrecta - La fecha de nacimiento que usted ingresó no concuerda con la fecha de nacimiento suministrada con su prueba de COVID-19. Usted puede haber recibido este mensaje por error o la fecha de nacimiento que obra en el expediente puede estar incorrecta. Por favor llame al equipo de la comunidad NC COVID al 844-628-7223 entre las 7:00 AM y 7:00 PM para comunicarse con un miembro del equipo y corregir este error.



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## WHAT CASES SEE: Case Notification and Portal (cont'd.)

5. Case patients who click "Next" will be taken to a page that provides them with a definition of a "close contact" and a calculated date for the start of their contagious period, which is calculated as 48 hours prior to their test date or symptom onset date (whichever is earlier). It also prompts them to submit information about their close contacts so that contacts can be notified of their exposure.
6. Clicking "Add Close Contact" provides the case with a form to complete the contact's first and last name, the last date of exposure, a phone number, email, and any additional information the case patient would like to provide via a free text box. **First name, last name, last date of exposure, and email OR phone are required.**
7. Clicking "Submit" will lock this contact and will automatically submit them into CCTO, and this process to submit a contact can be repeated as many times as needed. *See page 5 for details on locating this information when it arrives in CCTO.*
8. Clicking "Next" a final time after adding contacts provides a closing page with information about SlowCOVIDNC, resources for support, and information for contacting the local health department if needed. At this point, the case may close the page. *The case patient portal may be re-accessed at any point using the received link.*

5

Close Contact  
Explanation

6

Adding Close  
Contacts' Info

7

Submitting Close  
Contacts

8

Closing Page

**Note:** The system will permit any Last Date of Exposure regardless of whether it falls outside the close contact range. If the LDOE is a future date or before the case's contagious date (see #5), this contact will be submitted into CCTO but will not automatically become a contact event. *See page 5 for details.*

8

Closing Page



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## FOR ALL CCTO USERS: Locating Info From the Case Patient Portal Within CCTO

Information provided by cases through the case patient portal will update directly within CCTO (**NOT NC COVID**), and you can use this data to inform your contact tracing or case investigation work:

**NOTE:** As a result of the information required for case patients to utilize the case patient portal properly, **Date of Birth** and **NC COVID Diagnosis Date** (which will lock immediately upon completion) are required fields for all cases within CCTO. *If you add an incorrect NC COVID Diagnosis Date, turn the notification toggle off and request support via your admin or ServiceNow.*

1. When a patient enters information within the portal, their CCTO case monitoring event (ME), which has already flowed in automatically from NC COVID, will reflect a symptom onset date if one was provided. This is displayed in the editable **Symptom Onset Date** field.
2. Contact submissions made by case patients flow directly from the case patient portal into CCTO under the **Case Portal Submissions Tab**. All the contacts submitted here will **automatically** also have a contact monitoring event created within the **Monitoring Events Tab** as long as their last date of exposure is the current date or a past date that is after the case's contagious date; therefore, generally, no action is required on the Case Portal Submissions Tab.\*
3. Within the Monitoring Events Tab, each contact event that is created from a case's submissions will be assigned to the **county owner team** of the case patient who entered them into the portal.

**1**

Monitoring Details

Begin Monitoring?	---
Monitoring Status	---
Monitoring End Date	---
Final Monitoring Outcome	---
Symptom Onset Date	6/30/2021

**2**

Case Portal Submissions

Auto #	Create...	Status	First Name	Last Name	County (So...	Exposu...
E-0000001403	10/12/202...	Active	CloseConfN	CloseConLN	Wake	10/6/2...
E-0000001402	10/12/202...	Inactive	As5810/12...	CloseConL...	Wake	10/14...
E-0000001401	10/12/202...	Inactive	CloseConf...	CloseConL...	Wake	10/14...
E-0000001400	10/12/202...	Inactive	CloseConf...	CloseConL...	Wake	10/14...
E-0000001399	10/12/202...	Inactive	CloseConf...	CloseConL...	Wake	10/10...
E-0000001398	10/12/202...	Inactive	CloseConf...	CloseConL...	Wake	10/7/2...
E-0000001397	10/12/202...	Inactive	As5810/12...	CloseConL...	Wake	10/14...
E-0000001396	10/11/202...	Inactive	As5710/11...	CloseConL...	Wake	10/9/2...

**\*Note on contact submissions that are not automatically accepted:** If a case provides an LDOE for a submitted contact that is a future date or that is before the case's contagious date, a contact event will **not** be created automatically; however, the contact information will still be submitted in the portal and can be viewed in the Case Portal Submission Tab in CCTO. A CI should verify with the case whether this person is a true contact. See page 5 for details on how to identify these submissions and generate a contact event from them if needed.

**3**

Tom Chilling

Monitoring Event • MDA Form

Monitoring Event Assessments All Activities Recent Monitoring History Referrals System Information Related

Local Health District Information

County (Text)	Buncombe
Region	2
Local Health Department	Buncombe
State/Province	NC

Record Information

Modified On	4/20/2021	1:45 PM
Modified By	covid_arias	
Created On	4/20/2021	1:45 PM
Created By	covid_arias	
Legacy Created By	---	

System First Outreach Date 4/20/2021 1:45 PM

**Owner** Buncombe



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## FOR ALL CCTO USERS: Locating Info From the Case Patient Portal Within CCTO

4. The **Created from Case Portal** field in the System Information page will be toggled to "Yes" for any contact monitoring events that have flowed into CCTO from the case patient portal. *To display all contact events that originated from the case patient portal within the Monitoring Events Tab, you can filter the **Created from Case Portal** column at the far right of the **All Monitoring Events** view.*
5. Additionally, a section for notes called **Notes Provided from Case Patient on Online Case Portal** will appear on contact monitoring events created through the case patient portal if the "Additional Information" box was completed by the case patient during contact submission.

**4**

System Information Related

6/27/2021 6:59 PM

SYSTEM

6/25/2021 4:30 PM

Jahnavi Parikh

Status

Status \* Active

Status Reason Active

Cloned No

Cloned Record GUID ---

Created From Case Portal Yes

**5**

Monitoring Event Notes

Notes provided from Case Patient on Online Case Portal

testing

Last date you were in close contact with this person \*

6/2/2021

Phone Number

Email

testingforarias@gmail.com

Additional Info

testing

## FOR ADVANCED USERS AND CASE INVESTIGATORS:

For more information about reviewing case submissions, please see the next page.  
**You should only complete the manual approval process for these submissions if specifically instructed to do so.**



# Understanding the Case Patient Portal

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## FOR CASE INVESTIGATORS: Locating Case Patient Portal Contact Submissions

All information regarding any contacts submitted by the case patient is taken by the portal and stored within CCTO; **however, not all of these submissions automatically become new contact monitoring events (MEs).** Specifically:

- All contacts submitted by the case whose last date of exposure is **1) today or a past date AND 2) after the case's calculated contagious date (2 days before either their provided symptom onset date OR their test date)** **are** automatically created as contact MEs within CCTO.
- All contacts submitted by the case whose last date of exposure is **1) a future date OR 2) before the case's calculated contagious date (2 days before either their provided symptom onset date OR their test date)** **are not** automatically created as contact monitoring events in CCTO. If needed, you are able to review this submission and convert it into a new contact ME manually.

**If you have been instructed to review submission information**, you can follow the process below.

Visit the **Case Portal Submissions Tab**.

The available views filter on whether each submission has become a contact event. Note that any contact events that have been accepted as contact events (either manually or automatically) are automatically deactivated by the system.

To view all the contact submissions (accepted and non-accepted) for a particular case, you can filter the **All Case Portal Submissions** view by the **NC COVID Event ID of Case** column.

Status	First Name	Last Name	County (So...)	NC-COVID Event ID
Active	Banana	Smoothie	Dare	101212121
Inactive	Banana	Peel	Dare	101212121
Inactive	Fig	Leaf	Dare	101212121

## REVIEWING CASE PATIENT PORTAL SUBMISSION INFORMATION:

If you are a CCTO administrator or data manager or if you have been instructed by your local protocol to evaluate case patient portal submissions that have not been automatically accepted as contact events, **please see the next page.**

**You should only complete the manual approval process for these submissions if specifically instructed to do so.**



# Understanding the Case Patient Portal

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## FOR ADVANCED CCTO USERS: Evaluating Case Patient Portal Contact Submissions

**ONLY COMPLETE THIS PROCESS IF SPECIFICALLY INSTRUCTED TO DO SO.**

1. To see all active submissions that were not automatically turned to contact events, visit the **Case Portal Submissions Tab** and click on the **Active Portal Submissions That Did Not Become Contact Event Records** view, which serves as a to-do list of non-accepted submissions that must be reviewed. This view can be filtered by the county of the case patient in order to see only your county's submissions.
2. Clicking into a submission record within the **Case Portal Submissions Tab** will display all info and notes submitted by the case for a close contact.
3. Within a submission record, the locked **Contact Monitoring Event Created?** field shows whether this submission has been converted into a contact event. If it reads "Yes," then this submission is already a contact event within the Monitoring Events Tab, and the field is locked.
4. If it reads "No," then the system has not created a contact event from this submission. **A CI should verify with the case whether this person is a true contact.** If a submission is reviewed and determined not to be a true contact, it should be deactivated, which will remove it from the **Active Portal Submissions That Did Not Become Contact Event Records** view.

**1**

	Status	First Name	Last Name	County...	
21 ...	Active	D	Test	Wake	Wake
21 ...	Active	B	Test	Wake	Wake
21...	Active	Sonja	Alamo	Wake	Wake
21...	Active	Bernardo	Caba	Wake	Wake
21...	Active	Emilio	Caba	Wake	Wake
21...	Active	C	Tester	Wake	Wake
21...	Active	Joe	Shmo	Wake	Wake
21...	Active	sprint17-...	test	Wake	Wake

**2**

E-0000001129  
Case Portal Submission

Exposure Related

Basic Information

First Name \* Banana

Last Name \* Smoothie

Exposure Date \* 7/2/2021

Phone Number \* 1-444-333-4444

Email \* ---

Additional Info Example additional info

**3** **4**

Monitoring Event \* Pepper Baby

Contact Monitoring Event Created? ☐ No

Create Monitoring Event ☐ No



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## FOR ADVANCED CCTO USERS: Evaluating Case Patient Portal Contact Submissions

5. If a non-accepted submission is reviewed and determined to be a true contact who requires a contact event, you can manually toggle the **Create Monitoring Event** field to "Yes" and save. This creates a new contact monitoring event that will be owned by the owner team for the county of the case patient. *All of the fields on the contact submission record are locked, so any necessary changes to this contact's information must be made on the new event.*
6. Once this contact event is created, the system will automatically deactivate this submission record and lock the **Create Monitoring Event** field so that only one contact event may be created per each submission.

The screenshot illustrates the workflow for creating a monitoring event from a submission record. It is divided into two parts, labeled 5 and 6.

**Part 5:** Shows the 'E-0000001129 Case Portal Submission' form. The 'Basic Information' section includes fields for First Name (Banana), Last Name (Smoothie), Exposure Date (7/2/2021), Phone Number (1-444-333-4444), and Email (---). The 'Source Case-Patient Monitoring Event' is set to 'Pepper Baby'. The 'Contact Monitoring Event Created?' toggle is currently 'No'. A red box highlights the 'Create Monitoring Event' toggle, which is being switched to 'Yes'. A red arrow points from this toggle to the 'Banana Smoothie' monitoring event record in the 'Record Information' section on the right, which shows it was created on 7/1/2021 by 'Arias Covid-Temp'.

**Part 6:** Shows the submission record after the monitoring event has been created. The status is 'Read-only This record's status: Inactive'. The 'Create Monitoring Event' toggle is now locked and set to 'Yes'. The 'Created Contact Monitoring Event' is 'Lady Bug'.